

Clinical Applications of the Role Checklist Version 2: Quality of Performance

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This session will illustrate how occupational therapists can make use the RC V2: QP in diverse clinical settings:

- 1) In a psychiatric hospital setting with mental health clients, and
- 2) upon discharge from a medical setting to track recovery with transplant clients.

CLINICAL APPLICATION

Application 1: Psychiatric Hospital Setting

- Narrative: The case of Martin
- Martin's roles
- Using the RC v2 to formulate treatment goals
- Role assessment: Using the RC v2 as interview

The case of Martin

- A young man in his late 20s
- Living with his aunt for the last two years
- Unemployed, receiving time-limited disability pension, increasingly isolated over the last years
- Participation in online games and social media discussion forums
- Voluntarily admitted to psychiatric hospital treatment with paranoid delusions (social media surveillance)

Martin's roles (part I)

ROLE	TIME		
	PAST	PRESENT	FUTURE
Student	x		x
Worker	x		x
Volunteer			x
Caregiver			x
Home maintainer	x	x	x
Friend	x	(x)	x
Family member	x	x	x
Religious participant			
Hobbyist/amateur (sports performer)	x	x	x
Participant in organizations			x
Other role: "Participant in society"	x	x	x

Martin's roles (part II)

ROLE	VALUE		
	NOT AT ALL	SOMEWHAT VALUABLE	VERY VALUABLE
Student			x
Worker			x
Volunteer			x
Caregiver			x
Home maintainer		x	
Friend			x
Family member			x
Religious participant			
Hobbyist/amateur			x
Participant in organizations		x	
Other role: "Participant in society"			x

Martin's roles (part III)

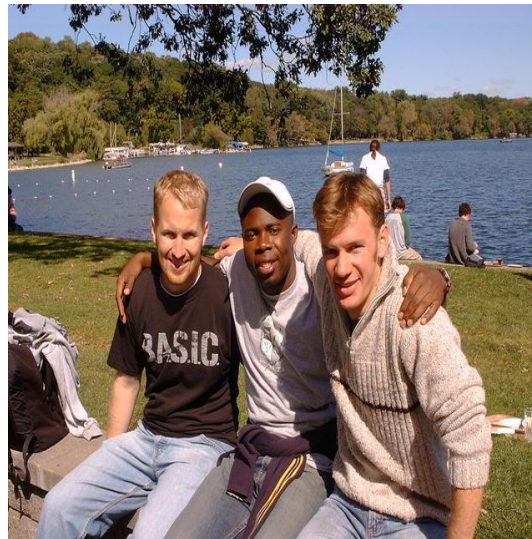
ROLE	PERFORMANCE		
	WORSE	SAME	BETTER
Student			
Worker			
Volunteer			
Caregiver			
Home maintainer			x
Friend	x		
Family member			x
Religious participant			
Hobbyist/amateur	x		
Participant in organizations			
Other role: "Participant in society"	x		

Martin: Role Checklist v2 Summary

- Martin had **lost roles** that he felt was **very valuable**
 - worker and student
- He planned to **perform most roles** in the **future**
- He experienced **worse performance** in some valued roles
 - friend, sports performer, participant in society
- He experienced **improved performance** in other valued roles
 - family member, home maintainer

Martin's prioritized roles

Friend



Worker



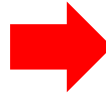
Sports performer



Using the RC to set goals

LONG TERM GOALS

- Re-establish and maintain contact with two friends
- Resume playing basketball with a team
- Get a job



SHORT TERM GOALS

- Invite the two friends to a movie and a café next Thursday
- Visit the Daytime Gym next Wednesday
- Meet with case manager on Tuesday

Experiences with using the Role Checklist as interview

- Flexible administration
- Sensitive issues
- Adding depth and context

Conclusions

- Useful tool focusing on participation
- Provides opportunity to reflect on current roles, as well as the client's role history and plans for future roles
- Client participation in discussing and interpreting the assessment results increase the motivation to make changes
- May serve as a starting point for prioritizing goals
- Facilitates reporting of useful information for treatment teams

References

Aslaksen, M., Scott, P.J., Haglund, L., Ellingham, B., & Bonsaksen, T. (2014). Occupational Therapy Process in a Psychiatric Hospital - Using the Role Checklist Version 2: Quality of Performance. *Ergoterapeuten*, 57(4), 38-45.

Bonsaksen, T., Meidert, U., Schuman, D., Kvarsnes, H., Haglund, L., Prior, S., Forsyth, K., Yamada, T. & Scott, P.J. (2015). Does the Role Checklist Measure Occupational Participation? *Open Journal of Occupational Therapy*, 3(3), article 2. DOI: <http://dx.doi.org/10.15453/2168-6408.1175>

OCCUPATIONAL THERAPY PROCESS IN A PSYCHIATRIC HOSPITAL

USING THE ROLE CHECKLIST VERSION 2: QUALITY OF PERFORMANCE

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USING THE ROLE CHECKLIST VERSION 2: QUALITY OF PERFORMANCE

Abstract

For several decades, occupational therapy researchers have collected data about clients' role performance with the Role Checklist, a widely used assessment tool, which collects self-reported information about clients' roles. The Role Checklist includes two parts; Part 1 gathers data about role incumbency and Part 2 gathers data about role value. In 2008, Part 3 for the Role Checklist was developed to address occupational role performance, specifically prompting clients to rank the quality of their current role performance compared to their highest prior level. This reflects the client perspective of occupational participation corresponding to the performance capacity component of MOHO; thus establishing the Role Checklist Version Two: Quality of Performance (RC V2: QP).

This paper illustrates by a case example how a therapist used the recently translated RC V2: QP in a psychiatric hospital setting in Norway in order to determine the extent to which the RC V2: QP supports the goal setting process as well as the therapist-client experience to verify subjective feasibility. It was reported that use of this instrument to guide the clinical interview was a positive experience for both the client and the therapist. The client had an opportunity to reflect upon his roles and how he would like to change them. The occupational therapist experienced that the interdisciplinary team working with this patient gradually developed a more comprehensive understanding of the patient's challenges and resources. The RC V2: QP provided a basic set of information about the patient's roles that was useful for setting treatment goals.

Keywords: Roles, role checklist, mental health, assessment, occupational therapy

Application 2: Post Liver Transplant

- Longitudinal application of the RC v2
- Track recovery following serious medical illness
- The story of Phillip
- Application to scoring development

The case of Phillip

- A male in his early 60s
- Living with wife and children in his own home
- Public service worker for 38 years
- At time of transplant it was unknown if he would return to work
- He has since been disabled, and has some difficulty with everyday tasks
- Post transplant Phillip was hospitalized for an extended time due to medical complications

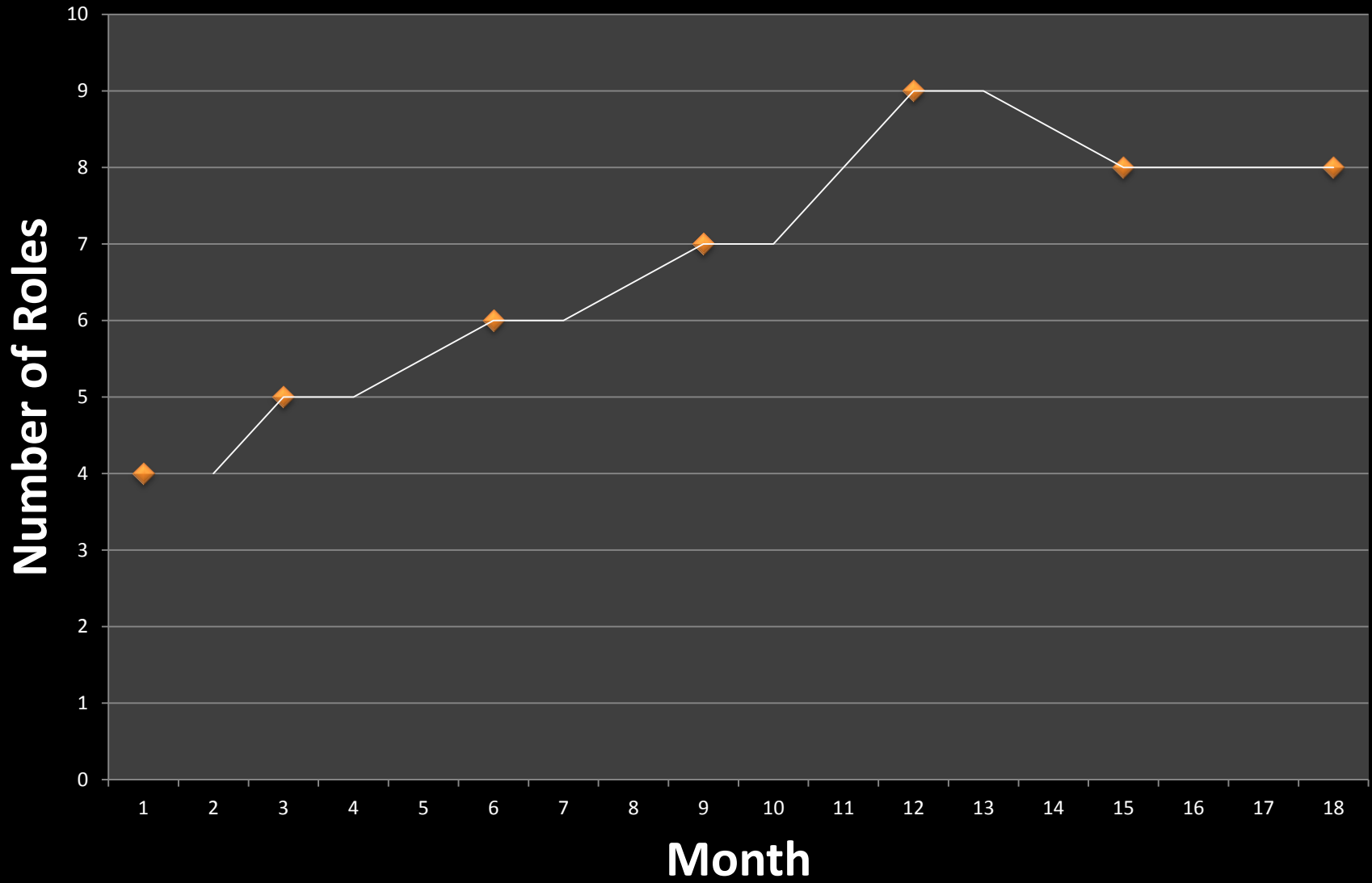
Phillip's Roles Past

ROLE	TIME: PAST
Student	X
Worker	X
Volunteer	X
Caregiver	X
Home maintainer	X
Friend	X
Family member	X
Religious participant	X
Hobbyist/amateur (sports performer)	X
Participant in organizations	X













Phillip's Role Incumbency over time

ROLE	TIME: PRESENT						
	Month						
	1	3	6	9	12	15	18
Student							
Worker					X		X
Volunteer					X	X	X
Caregiver	X	X	X	X	X	X	X
Home maintainer	X	X	X	x	X	X	X
Friend	X	X	X	X	X	X	X
Family member	X	X	X	X	X	X	X
Religious participant				X	X	X	X
Hobbyist/amateur (sports performer)		x	X	X	X	X	X
Participant in organizations			x	x	X	X	
Total roles	4	5	6	7	9	8	8

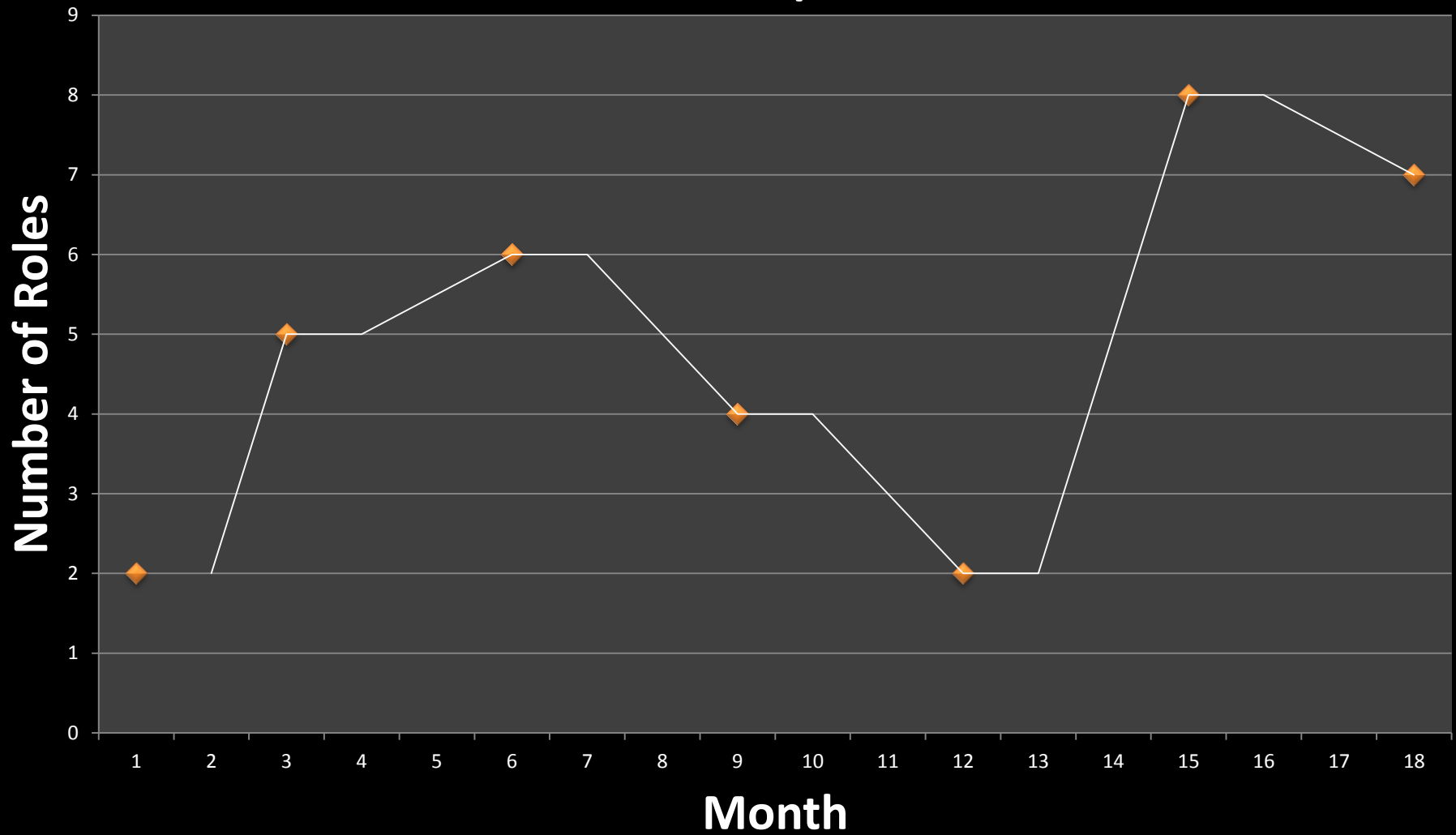
Phillip's Role Incumbency Over Time



Phillip's Role Incumbency over time contextualized by satisfaction with performance

ROLE	TIME: PRESENT						
 = decreased satisfaction with performance	Month						
	1	3	6	9	12	15	18
Student							
Worker							
Volunteer						X	X
Caregiver		X	X			X	X
Home maintainer		X	X			X	X
Friend	X	X	X	X		X	X
Family member	X	X	X	X	X	X	X
Religious participant					X	X	X
Hobbyist/amateur (sports performer)		x	X	X		X	X
Participant in organizations			x	x		X	
Other role: "Participant in society"							

Phillip's Incumbency over time contextualized by satisfaction with performance



Phillip: Role Checklist v2 Summary

- Phillip steadily resumed roles over the first year post transplant.
- He planned to **perform most roles** other than student, and at 12 months worker in the **future**.
- Part 3 provided a strikingly different picture of his performance.
- Phillip's decreasing health was evident only in the contextualized score.

Conclusions

- Useful tool to measure change in participation over time
- Provides opportunity contextualize role participation relative to an individual.
- Allows for the rating of satisfaction.
- Enables identification of decline in participation
- Enables identification of decline in satisfaction with participation

Experiences with using the Role Checklist as interview – mentioned previously

- Flexible administration
 - Sensitive issues
 - Adding depth and context
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Combined Experiences with using the Role Checklist as Interview or monitor of progress

- Flexible administration
- Sensitive issues
- Adding depth and context

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- Allows for tracking progress over time
 - Shows when a decline is taking place signaling a change

References

Aslaksen, M., Scott, P.J., Haglund, L., Ellingham, B., & Bonsaksen, T. (2014). Occupational Therapy Process in a Psychiatric Hospital - Using the Role Checklist Version 2: Quality of Performance. *Ergoterapeuten*, 57(4), 38-45.

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